# Working with list pages

For RiskMan Version 18.07

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# Introduction

Every record list page that you have permission to view in RiskMan can be configured to suit your requirements. Further to this, each record list page can be configured *individually*, meaning that for example if you can see the

- Entered Incidents page,
- Incident Inbox page, and
- Posted Incidents page

...you can set each one up with its own unique configuration.

You are able to:

- Change the columns being displayed, their widths, and the order in which they appear
- Change the number of rows shown per page
- Change the way the list is sorted, grouped, and filtered
- Save the way you've configured the page as a "View", and switch between your personally configured views
- Export the resulting list page to a Microsoft Excel file if you wish

This guide also explains list page functionality which is based on user permissions, so you might not have permission to some of these functions (it depends on your level of access). These include:

- Ability to generate a "Letter", based on an existing record in a register
- Ability to clone or update a record
- Ability to reassign ownership of a record

#### (i) Note

This information in this guide applies to <u>any</u> register, however we have used an Incident register in the screenshots as it is the most universal register.

## List page basics

Here's an explanation of the common functions on your list pages:

rţ	S			n vative R	<b>ar</b> isk Manager	nent		Ire	nining Site		TRAINING	6 SI	TE	For Review: 3 News 19 New Edits: 0 Inbox: 54
٠	C		My W	orksp	ace 🕶	Manage	ement •	- Administration	• ▼ Reports ▼ Hel	p - Log Out Feed	lback Module			USER: System Manager (Manage
°?	L	Se	elect a r	ecor	d to disp	lay the a	vailabl	e tools.	5	INBOX - Inc New Incide	tidents for Rev	/ie	w	6 🌣 📰 🖉 🖷
Dra	ga	colur	1	er he	ere to gro	oup by tha	at colun	nn			2			
		ĺ	Dist		ID	▲ Gro	up	Incident Date 💌	Incident Involved 💌	Facility 💌	Location	•	Outcome 💌	Summary 🔻
						Ŷ	Ŷ	<b>-</b> ♥	Ŷ	Ŷ		Ŷ	8	Ŷ
	۲		Non	e	338	9		1 Jun 2012	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor		ISR 2 HIGH	Fell in shower
	۲		Non	e	347	4	3480	3 Feb 2012	Staff Member	Eucalyptus Lodge	Cafeteria		ISR 4 MINOR	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	۲		) Non	e	348	<u>о</u> м	laster	13 Jun 2012	Intervention	Acacia Private	Dayton		ISR 4 MINOR	Pt delivered incorrect dosage instructions on medication
æ	۲		Non	e	348	<u>1</u> M	laster	23 Jun 2012	Client	Eucalyptus Lodge	Community Health Centre		ISR 1 SEVERE	Client became aggressive during meal time
	۲	>	Non	e	349	3		29 Jan 2012	Client	Acacia Private	Centre Block 4th Floor		ISR 3 MEDIUM	Pt adminstered extra dose of heparin not happy!
	۲		Non	e	349	Z		25 Feb 2012	Client	Acacia Private	Day procedure unit		ISR 3 MEDIUM	SPECIMEN LOST AFTER COLLECTION
	۲		Non	e	353	6	3531	25 Jul 2012	Volunteer	Acacia Private	Centre Block 1st Floor		ISR 4 MINOR	Pt administered extra dose of panadol
	۲		Non	e	353	Z		5 Aug 2012	Client	Acacia Private	Centre Block 4th Floor		ISR 2 HIGH	Client became aggressive during theatre transfer because staff
	۲		Non	e	354	5		15 Sep 2012	Client	Acacia Private	Centre Block 7th Floor		ISR 3 MEDIUM	Pressure wound degrading to Grade 2 status
	۲	>	1		357	2		3 Feb 2011	Client	Acacia Private	Centre Block 7th Floor		ISR 2 HIGH	ABO Blood Incompatibly during transfusion
	۲		Non	e	357	3		1 Feb 2011	Relative/Visitor	Acacia Private	Emergency Department		ISR 5 NEAR MISS	Visitor entered ED in an intoxicated state and abused staff
	۲		Non	e	357	4		3 Feb 2012	Staff Member	Acacia Private	Cardiac Rehab		ISR 4 MINOR	Staff member hurt back lifting patient from bed to chair
	۲		Non	e	358	1		31 Mar 2011	Client	Acacia Private	East Block 1st Floor		ISR 4 MINOR	Pt fell in shower
	۲		Non	e	358	2		1 Apr 2011	Client	Acacia Private	Patients Home		ISR 4 MINOR	Client became aggressive during home visit
	۲		Non	e	358	3	3576	23 Feb 2011	Client	Acacia Private	GICU		ISR 4 MINOR	Client became aggressive in reception - assaulted staff member
54 R	ecor	ds F	ound (F	age :	L of 4)	3								4 Items per page: 15 • ≪ < 1 • > >>

- You cannot modify these columns; they will always be displayed as-is.
- Oclumns that you can change: Column order, widths, show/hide, etc
- Pagination info: Total records and page count
- 9 Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page
- S Toolbar: When you select a record, the available functions/options for working with that record appear here
- **6** Toolbar: Options for configuring and working with your list page overall

#### The fixed columns: Explanation

• "Administrative" status of the record. Click the California icon for more information.

• Your personal viewing status of the record. Green: You've never opened it. Grey: You have opened it. Red: Since you last opened it, someone else has modified it. Also, click the icon to open the Review History of the record.

• The paperclip tells you there is at least 1 document attached to the record

• Dist is short for Distribution List. Usually it will say None. In this example, there is a number -1 - in one of the rows. This represents the number of users who have been put on the Distribution List for that record *who have not yet viewed it*. This column is also a shortcut – click it to distribute the record to other users.

**6** Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.

**6** ID number: Click on the record's ID number to open it. Note that you <u>do not</u> need to check the record's selection box before clicking the ID number!

	2	3	4	(5)	6
-	-	ŋ	Dist		ID 🔺
					٣
	۲		None		<u>3389</u>
	۲		None		<u>3474</u>
	۲	Ű	None		<u>3480</u>
	۲	U	1		<u>3481</u>
	۲		None		<u>3493</u>

## Modifying your list page

Changing the columns shown on your page

#### Essentials

Click the Change Columns icon in the toolbar.



The Change Columns dialog is shown. Highlighted at the top of the list are the columns currently being displayed on your list page:

Cha	ange Co	lumns	<b>A</b> ×
		Change Columns	Cancel Save
	This pag	ge allows you to choose which columns of information you wou	Ild like to see on your Incidents page. 🔞 Display 'Advanced' Columns 🗌
	#	Field Label	Sort Order
	2	3	
		Incident Date	1
	<b>V</b>	Incident Involved	4
	<b>V</b>	Location	5
	<b>V</b>	Summary	6
	<b>V</b>	Outcome	7
	<b>V</b>	Facility	9999
		24 Hrs prior to Patient in	9999
		A.C.D. Completed After MET	9999
0		A.C.D. Prior	9999
G		A.C.D. Suggested	9999
		Activity At The Time	9999
		Acute Illness	9999

- Uncheck to remove column
- Scroll through the list of fields and check each one you want to display as a column on your list page
- 6 Can't find what you're after? Start typing a field name here to search the list
- Set the default order of your columns. This is useful when ever you clear a view in your list page, it will assume the order you have set. 9999 is set to alphabetical order
- S Click the **Save** button once you're done. Your list page will refresh, and the columns you selected will be displayed.



#### Extras

#	Field Label
$\mathbf{n}$	
	ncident Date
	Incident Affected ×
	Location

You can edit the **Field Label** if you like. You might do this to abbreviate a long field name. Your changes are only visible on this list page, and they will not affect any other part of the system.

ang	e Columns				
		Change Colum	nns	ancel Save	/
Thi	is page allows you to choose whic	h columns of info <del>r</del> mat	ion you would like to see on Displa	your Incidents page. 🔞 y 'Advanced' Columns 🗹	
*	Field Label	Sort Order	Field Name	Field Type	
1	Incident Date	1	IncidentDate	Incident	
7	Incident Involved	4	IncidentInvolved	Incident	
7	Location	5	Incident_Location	Incident	
1	Summary	6	Description	Incident	
		7	Outcome	Incident	
7	Outcome	,	outcome	arrend arre	

Check the **Display 'Advanced' Columns** box to show additional information for each field. You might need to use this option to differentiate between several fields from your register that have the same label; in which case, you could determine which is which by referring to the **Field Name** column, which contains the unique name of that field in the database.

#### Change the order of your columns

Simply click and drag a column header to a new spot to rearrange your columns. When you see the two white arrows, you can release your mouse button. The system remembers your changes as you go.

1					2						
Incident Involved 💌	Facility 💌	Location	Outcome	) u	Incident Involved 💌	Facility 💌	Location	-	Outcome	-	Su
♥	♥	V			Ŷ	♥		Ÿ		٣	
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel	Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor		ISB 2 HIGH		Fe
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp	Staff Member	Eucalyptus Lodge	Cafeteria		ISR 4 MINOR		Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt	Intervention	Acacia Private	bayton		ISR 4 MINOR		Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli	Client	Eucalyptus Lodge	Community Health Centre		ISR 1 SEVERE		Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt	Client	Acacia Private	Centre Block 4th Floor		ISR 3 MEDIUM		Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP	Client	Acacia Private	Day procedure unit		ISR 3 MEDIUM		SP
3	÷				4						
Incident Inv Outcome	Facility 🔻 💌	Location 💌	Outcome 💌	Su	Incident Involved 💌	Outcome 💌	Facility <	Locatio	n		Su
<b>P</b>	°	♥	•		♥	<b>9</b>	<b>\$</b>			٣	С
Patient/Client	Europhitus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel	Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre	Block 7th Floor		Fe
Staff Member	Eu al, otus Lodge	Cafeteria	ISR 4 MINOR	Sp	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeter	ia		Sp
Intervention	Acacia Privete	Dayton	ISR 4 MINOR	Pt	Intervention	ISR 4 MINOR	Acacia Private	Dayton			Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli	Client	ISR 1 SEVERE	Eucalyptus Lodge	Commu	inity Health Centre		Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt	Client	ISR 3 MEDIUM	Acacia Private	Centre	Block 4th Floor		Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP	Client	ISR 3 MEDIUM	Acacia Private	Day pro	ocedure unit		SF

### Adjust the widths of your columns

Once you have your columns in their desired order, you can adjust their widths to make the best use of the space available on your screen. We recommend adjusting them from left to right.

Put your mouse cursor on the line the separates each column. Click and drag left to right to adjust as needed.



Once you have adjusted all the column widths as desired, click the save icon  $\overrightarrow{\mathbf{G}}$  in the toolbar to save your changes.

Note that the save icon only appears in the toolbar *after* you've started adjusting the width of your first column.

### Sort your list

Click on a column heading to sort your records by values in that column.

The arrow represents whether you are sorting in ascending or descending order.

The column you sort by will always be remembered on this list page.



### Group the records on your list page

Group the records based on one of the columns showing in your list. In this example we've grouped our incidents by their severity rating:

Ľ		Sel	ect a	record	to dis	play the	available tools.		INBOX - Incidents for Review New Incidents and edits of Incidents									
	Dutco	ome 🔺	•															
			ŋ	Dist		ID	Incident Date	• •	Incident Involved	Facility	-	Group	Location	•	Summary			
						9		- 🕈	<b>v</b>		٣	7		٣				
Ξ	O	utcome	: ISR	1 SEVE	RE													
		3 0	Ű	None		<u>3481</u>	23 Jun 2012		Client	Eucalyptus Lodge		Master	Community Health Centre		Client became aggressive during r			
Ξ	O	utcome	: ISR	2 HIGH														
	ų,			None		<u>3537</u>	5 Aug 2012		Client	Acacia Private			Centre Block 4th Floor		Client became aggressive during t			
			Ú	None		<u>3667</u>	1 Aug 2012		Patient/Client	Acacia Private			Centre Block 2nd Floor		Pt fell from bed and fractured fem			
	D	۲		None		<u>3389</u>	1 Jun 2012		Patient/Client	Eucalyptus Lodge			Centre Block 7th Floor		Fell in shower			
	é	1		1		<u>3572</u>	3 Feb 2011		Client	Acacia Private			Centre Block 7th Floor		ABO Blood Incompatibly during tra			
Ξ	Ou	utcome	: ISR	3 MEDI	UM													
		<		None		<u>3752</u>	9 Dec 2014		Patient/Client	Acacia Private			ACAS		Gonna make a few changes			
	<i>C</i>	۲		None		<u>3742</u>	28 Nov 2014		Patient/Client	Acacia Private		Master	Cafeteria		Stained a red dress			
	<i>C</i>	،		None		<u>3704</u>	12 Mar 2013		Patient/Client	Acacia Private			Centre Block 5th Floor		Resident fall in home on lino floor			
	ß	9		None		<u>3545</u>	15 Sep 2012		Client	Acacia Private			Centre Block 7th Floor		Pressure wound degrading to Grad			
	E			None		3497	25 Feb 2012		Client	Acacia Private			Day procedure unit		SPECIMEN LOST AFTER COLLECT			

In order to group your records, click and drag the column header to the space above the list which says **Drag a column header here to group by that column**:

Drag	) a co	lumn	header	here	e to group l	by that column		
		ŋ	Dist		ID	Incident Date 🔻 💌	Incident Involved	Outcome <
					7	- 🕈	♥	♥.
	۲		None		<u>3757</u>	12 Jan 2015	Patient/Client	ISR 4 MINOR

Click and drag a column header to the grouping area. When you see the two white arrows, you can release your mouse button. The system remembers the groupings you have added.

_													_								Outcome				
C	rag a column header here to group by that column													g a c	olumn	heade	here	to group	by that column		Ċ	_			
		0	Dist		ID	Incident Date	-	Incident Involved	ſ	Outcome	-	Ficility			0	Dist		ID	Incident Date	Inc	ident Involved	-	Outcome	-	Facility
					8		- 🕈		-									Ŷ	-	♥		٣		٣	
			None		<u>3757</u>	12 Jan 2015		Patient/Client		ISR 4 MINOR		Acacia Private		۲		None		<u>3757</u>	12 Jan 2015	Pat	ient/Client		ISR 4 MINOR		Acacia Private
	<u> </u>		None		<u>3752</u>	9 Dec 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private		۲		None		<u>3752</u>	9 Dec 2014	Pat	ient/Client		ISR 3 MEDIUM		Acacia Private
6	۰ 🖄		None		<u>3742</u>	28 Nov 2014		Patient/Client		ISR 3 MEDIUM		Acacia Private	6			None		<u>3742</u>	28 Nov 2014	Pat	ient/Client		ISR 3 MEDIUM		Acacia Private
6	۰ 🖄		None		<u>3735</u>	28 Nov 2014		1 ent/Client		ISR 4 MINOR		Acacia Private	<b>(</b> )			None		<u>3735</u>	28 Nov 2014	2	ent/Client		ISR 4 MINOR		Acacia Private
		0	None		<u>3711</u>	22 Sep 2014		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		۲	Ú	None		<u>3711</u>	22 Sep 2014	Sta	ff Member		ISR 4 MINOR		Eucalyptus Lodge
			None		<u>3710</u>	19 Sep 2014		Patient/Client		ISR 4 MINOR		Acacia Private		۲		None		<u>3710</u>	19 Sep 2014	Pat	ient/Client		ISR 4 MINOR		Acacia Private
л					1																				
÷	Outco	mem	nheade	r ere	e to group l	by that column				·			0	utcom	e 🔺			/							
≎ ©	Outco	eme n	n headd Bist	re I	e to group I ID	by that column Incident Date	Y	Incident Involved	•	Outcome	•	Facility	0	ıtcom	e 🔺	-	ist	ID	Incident Date	•	Incident Involv	ed	▼ Facility		Group
€	Outco	me 0	bist	- re	e to group I ID	by that column Incident Date	▼ ▼ \$	Incident Involved	▼ ♥	Outcome	▼ ▼	Facility	0	ıtcom	e 🔺	- 0 c	ist		Incident Date	<b>•</b>	Incident Involve	ed	<ul> <li>▼ Facility</li> </ul>		▼ Group
≎ ©	Outco	ome O	None		e to group I ID <u>3757</u>	by that column Incident Date 12 Jan 2015	▼ ▼ ♥	Incident Involved Patient/Client	▼ ♥	Outcome ISR 4 MINOR	▼ ♥	Facility Acacia Private		utcom	e 🔺	• C	ist		Incident Date	- - - -	Incident Involve	ed	Facility		▼ Group
₽	Outco	me 0	None		e to group I ID <u>3757</u> <u>3752</u>	by that column Incident Date 12 Jan 2015 9 Dec 2014	v • 9	Incident Involved Patient/Client Patient/Client	<b>▼</b>	Outcome ISR 4 MINOR ISR 3 MEDIUM	▼ ♥	Facility Acacia Private Acacia Private		utcom Outo	e 🔺	O D ISR 1 S	ist EVER one	E 348	Incident Date	▼ ▼ ♥	Incident Involve	ed	Facility     Eucalyptus	Lodge	▼ Group ♥
	Outco	eme Q V V V V V	None None		ID 3757 3752 3742	by that column Incident Date 12 Jan 2015 9 Dec 2014 28 Nov 2014	▼ ▼ Ÿ	Incident Involved Patient/Client Patient/Client Patient/Client	▼ ♥	Outcome ISR 4 MINOR ISR 3 MEDIUM ISR 3 MEDIUM	▼ ▼	Facility Acacia Private Acacia Private Acacia Private		Utcom Outo	e 🔺 ome: @ ome:	ISR 1 S	ist EVER one IIGH	E 348	Incident Date       V       Incident Date       V       Incident Date       Incident Date	• •	Incident Involv	ed	Facility     Facility     Eucalyptus	Lodge	▼ Group ♥ Ma
		eme 0 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	None None None None		E to group I ID 3757 3752 3742 3735	by that column Incident Date 12 Jan 2015 9 Dec 2014 28 Nov 2014 28 Nov 2014	V V V	Incident Involved Patient/Client Patient/Client Patient/Client 3 ent/Client	▼ ♥	Outcome ISR 4 MINOR ISR 3 MEDIUM ISR 3 MEDIUM ISR 4 MINOR	▼ ▼	Facility Acacia Private Acacia Private Acacia Private Acacia Private Acacia Private	-	Outo	e 🔺 ome: @ ome:	ISR 1 S	ist EVER one IIGH one	E 338	Incident Date       Image: State Stat	•	Incident Involve	ed	Facility     Facility     Eucalyptus     Eucalyptus	Lodge	T Group
			None None None None None		E to group ID 3757 3752 3742 3742 3735 3711	by that column Incident Date 12 Jan 2015 9 Dec 2014 28 Nov 2014 28 Nov 2014 22 Sep 2014	<b>v</b> <b>v</b>	Incident Involved Patient/Client Patient/Client Patient/Client 3 ent/Client Staff Member	▼ ♥	Outcome ISR 4 MINOR ISR 3 MEDIUM ISR 3 MEDIUM ISR 4 MINOR ISR 4 MINOR	<ul> <li>▼</li> <li></li> </ul>	Facility Acacia Private Acacia Private Acacia Private Acacia Private Eucalyptus Lodge		Outo	e 🔺 ome: @ ome: @	ISR 1 S	ist EVER one HIGH one 1	E 338	Incident Date ▼ 1 23 Jun 2012 2 1 Jun 2012 3 Feb 2011	•	Incident Involve Client Patient/Client Client	ed	Facility     Facility     Eucalyptus     Eucalyptus     Acacia Priv.	Lodge Lodge ate	▼     Group       ▼     Ma

You can add subsequent grouping levels by following the same steps.

To **remove** a level of grouping, simply click and drag the column header back to where you want it to be in the list.



### Filter your list

You can apply a filter to one or more of the columns showing on your list page, so that you only see a specific subset of the records in your list. Each column header has a filter box underneath it:

-																				
ଂଚ		Sele	ct a re	ord t	o display	the available	tools.			IN	IBOX - Inc	cic	dents for Revi	ie	W		<b>\$</b>	Ħ	×国	
					. ,						New Incide	ents	and edits of Incidents							
Dra	ag a c	columr	heade	here	to group	by that colum	n													
		ົ	Diet		ID +	Group	Incident Date		Incident Involved		Outcome	-	Facility	a	Location	Summany				
		-0	Dist			GIUUD	Incluent Date		Incluent Involved		Outcome		Facility		Location	Summary				
					Ŷ	8		- ?		٣		٣	?	•	\$					₹ <b>₽</b>
	۲		None		<u>3389</u>		1 Jun 2012		Patient/Client		ISR 2 HIGH	-	Eucalyptus Lodge		Centre Block 7th Floor	Fell in shower				
2		>	None		<u>3474</u>	3480	3 Feb 2012		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		Cafeteria	Split hot coffee and tomato sauce on clothin	ıg, 2nd o	degree bu	irns.	
		J	None		3480	Master	13 Jun 2012		Intervention		ISR 4 MINOR		Acacia Private		Dayton	Pt delivered incorrect dosage instructions or	n medica	tion		
		J	None		<u>3481</u>	Master	23 Jun 2012		Client		ISR 1 SEVERE		Eucalyptus Lodge		Community Health Ce	Client became aggressive during meal time.				
	•		None		<u>3493</u>		29 Jan 2012		Client		ISR 3 MEDIUM		Acacia Private		Centre Block 4th Floor	Pt adminstered extra dose of heparin not	happy!			
			None		2407		25 Eab 2012		Client		ISR 3 MEDILIM		Acacia Private		Day procedure unit	SPECIMEN LOST AFTER COLLECTION				

Click the funnel icon to select the type of filter test you want to apply:

Incident Involved	-	Outcome 🔽	Fac	Incident Date	-	Incident Involved 🔽 Ou	itcome
	9	٣		-		♥	_
Patient/Client		Begins with	Euc	1 Jun 2012		Equals	HIG
Staff Member		Contains	Euc	3 Feb 2012		Doesn't equal	MIN
Intervention		Doesn't contain	Aca	13 Jun 2012		Is less than	MIN
Client		Ends with	Euc	23 Jun 2012		Is less than or equal to	SEV
Client		Equals	Aca	29 Jan 2012		Is greater than	MEI
Client		Doesn't equal	Aca	25 Feb 2012		Is greater than or equal to	ME
Volunteer	L.,	Like ('%', '_')	Aca	05 3 10040		Malantana Tel	
Client			0				

Left: Filter tests that can be used against data fields Right: Filter tests that can be used against date / time / numeric fields

Type the desired value and press Enter on your keyboard. Your list will then only display matching records:

		0	Dist		ID 🔺	Group	Incident Date	Ŧ	Incident Involved	Outcome	-	Facility 💌	Location	•	Summary 💌
					8	٣	-	8	staff 🛛 🕈		٣	<b>\$</b>		٣	v
	۲		None		<u>3474</u>	3480	3 Feb 2012	T	Staff Member	ISR 4 MINOR		Eucalyptus Lodge	Cafeteria		Split hot coffee and tomato sauce on clothing, 2nd degree burns.
	۲		None		<u>3574</u>		3 Feb 2012	I	Staff Member	ISR 4 MINOR		Acacia Private	Cardiac Rehab		Staff member hurt back lifting patient from bed to chair
	۲		None		<u>3590</u>		18 Aug 2011	I	Staff Member	ISR 3 MEDIUM		Acacia Private	Main Entrance		I was assaulted by a patient outside main entrance when I was coming $t_{\cdot\cdot\cdot}$
	۲		None		<u>3591</u>		19 Aug 2011	T	Staff Member	ISR 3 MEDIUM		Acacia Private	Centre Block 2nd Floor	r	Assault by client in reception
	۲		1		<u>3631</u>	Master	3 Feb 2012	T	Staff Member	ISR 3 MEDIUM		Acacia Private	Centre Block 3rd Floor	•	Became aggressive towards a staff member
	۲		1		<u>3697</u>	3696	7 Jan 2013	I	Staff Member	ISR 4 MINOR		Acacia Private	Ward 1F		Fell over
	۲	U	None		<u>3711</u>		22 Sep 2014		Staff Member	ISR 4 MINOR		Eucalyptus Lodge	Applicances		stuff stuff
7 Red	ords	Foun	d (Page	1 of	1)										Items per page: 15 💽 🔍 << 1 💽 > >>

To remove a filter, click into the filter box, delete your filter criteria, and press the Enter key on your keyboard.

To remove all filters at once, click the **Clear Filter** icon  $\mathbf{X}$  in the toolbar:

Select a record to display the available tools.       INBOX - Incidents for Revie         New Incidents and edits of Incidents												W			
Drag	) a co	olumn	header	r here	to group b	by that column	ı								
		Ø	Dist		ID 🔺	Group	Incident Date	-	Incident Involved	-	Outcome	•	Facility	-	Locati
					٣	٣		- 7	staff	7		٣		٣	
	۲		None		<u>3474</u>	3480	3 Feb 2012		Staff Member		ISR 4 MINOR		Eucalyptus Lodge		Cafete
	۲		None		<u>3574</u>		3 Feb 2012		Staff Member		ISR 4 MINOR		Acacia Private		Cardia
	۲		None		<u>3590</u>		18 Aug 2011		Staff Member		ISR 3 MEDIUM		Acacia Private		Main B

#### Save the way you have configured your list as a "View"

Once you have setup the columns you want, and applied sorting, filtering, or grouping to your list, you can then save that configuration as what is called a View. You can have multiple saved views that you can switch between with the click of your mouse.

In this example, we've grouped our records by the Incident Involved field, and we have sorted the records by incident date.

In order to save this as a view, we need to click the View icon in the toolbar.





Views × Views Views allow you to save the current configuration of your list of records (columns displayed, sorting, grouping and even any filtering applied either from the grid or the Selection Settings popup) for future use. You can then Apply any View you have previously saved and instantly change the setup of your list. Save the current list configuration as a View 82 By Incident Involved Saved Views for the (Incident Inbox) View Name Apply )elet 4 By Location and II Ŵ 4 By Outcome ŵ USER: System Manager (Manager) p 🔹 🛛 Log Out Incidents for Review

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			-		
0	Type	a nan	ne for	your	View.

Olick the Save icon . You will be returned to the list page, and a message will be displayed to confirm your view was saved.

S You can delete any of your existing views by clicking the respective Delete icon III.

You can now switch between your saved Views by hovering your mouse (do not click) over the Views icon 🛅, and clicking the **Apply** icon **f** of the View you wish to load.

# Export the list page to Excel

You can export the records shown on the current list page by click the Excel icon 💵 in the toolbar.

Only the first page is exported, so if you list contains more records than can be displayed on one page because of your pagination settings, simply increase the number of items per page so that they fit on to one page.

، 🖌			None		<u>3723</u>		7		I	Blah blah blah	ISR 4 M	INOR		
177 Pecerde	c Found (I	Dago	1 of 10					_	Itom	per page 10			•	
177 Records	s Found (i	Paye	1 01 10	"			_		Items	sper page. 10		11 1	1	• • •
،		U	None		<u>2</u>	e		Info	m	Injury to low	Return	ied to f		
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By Incident Involved

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By Location and II

By Outcome

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#### **Selection Settings**

In the toolbar, you'll note the Selection Settings cog icon 🏶. It contains the following functionality:

- Switch between the various record list pages that you have permission to view
- Restrict the records being shown on your page by record type; in this example by Incident Involved

• Restrict the records being shown on your page using date filters (the date fields available will vary by register)

Restrict the records being shown on your page by specific record ID numbers. Separate multiple ID numbers using a comma, e.g. 51,73,106 etc

Selection Settings		×
	Selection Settings	
Display:	1 Inbox (Incidents)	
Incidents Involving:	2 All Incidents 🔹	
Date Entered:	3 From To	
Incident Date:	From To	
Notification Date:	From To	
Incident IDs:	9	
Allow rows to expand we have a compared with a	rertically: 🌀 🗆	
	Clear La	iyout

• You set the width of the columns you have chosen to display on your list page. By default, if any individual cell contains more information than can be shown, the information will be truncated, and an ellipsis displayed instead.

Enabling this setting will force the content to be displayed; information in the fields will wrap instead of being truncated.

Summary 💌	Summary 💌
♥	♥
Visitor entered ED in an intoxicated state an	Visitor entered ED in an intoxicated state and abused staff
ABO Blood Incompatibly during transfusion	
where the second s	ABO Blood Incompatibly during transfusion
Patient has incurred complication with stag	Patient has incurred complication with stage
Client became aggressive in reception - assa	3 pressure ulcer
person became aggressive	Client became aggressive in reception - assaulted staff member

Left: Setting turned off Right: Setting turned on

**o** Once you have configured the various settings, click the **Apply Settings** button. Your list page will refresh with your desired settings in place. The settings you apply here will be remembered until you decide to change them.

Should you wish to return your list page back to a "default" configuration, click the Clear Layout button. This returns your list page to the default settings, including columns displayed, removing all sorting, filtering, and grouping, and clears all of the settings applied in the Selection Settings dialog. Note that any Views you have created will not be affected by this action.